

ARIZONA FIDUCIARIES ASSOCIATION, INC.

REQUEST FOR PROPOSAL

WEB SITE DESIGN & DEVELOPMENT

SEPTEMBER 1, 2005

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1. Summary

The Arizona Fiduciaries Association, Inc. (AFA) is accepting proposals to design and develop the association's web site. This will be a concept to completion production. The purpose of this RFP is to provide a fair evaluation for all candidates and to provide the candidates with the evaluation criteria against which they will be judged.

2. Proposal Guidelines and Requirements

This is an open and competitive process.

The proposal must contain the signature of a duly authorized officer or agent of the company submitting the proposal.

The price you quote should be inclusive. If your price excludes certain fees or charges, you must provide a detailed list of excluded fees with a complete explanation to the nature of those fees.

If the execution of work to be performed by your company requires the hiring of sub-contractors you must clearly state this in your proposal. Sub-contractors must be identified and the work they will perform must be defined. In your proposal, please provide the name, address, and other contact information of the sub-contractor. The AFA will not refuse a proposal based on the use of sub-contractors; however, we retain the right to refuse the subcontractors you have selected.

Provisions of this RFP and the contents of the successful responses are considered available for inclusion in final contractual obligations.

3. Contract Terms

The AFA will negotiate contract terms upon selection. All contracts are subject to review by AFA legal counsel, and a project will be awarded upon signing of an agreement or contract that outlines terms, scope, budget, and other necessary items.

4. Background

The Arizona Fiduciaries Association, Inc. is a non-profit organization whose purpose is to provide structure, guidance, training and continuing education for certified fiduciaries (CF) in Arizona.

AFA welcomes individual memberships of persons who are fiduciaries or work in the field of probate, including guardianships, conservatorships and other probate proceedings.

The AFA was originally established in the early 1980's as the Arizona Association of Public and Private Fiduciaries and evolved into the Arizona Fiduciaries Association April 1995 and has enjoyed steady membership growth and recognition since that time. There are currently over 150 members of the AFA. The AFA became a state affiliate of the National Guardianship Association in November 1999.

Mission

The Arizona Fiduciaries Association, Inc. will take a progressive leadership role in ensuring that professional, efficient, compassionate fiduciary and probate services are provided to all Arizona residents in need of such services.

Values

1. We believe that all individuals have the right to dignity and respect.
2. We believe that all individuals are entitled to courteous, competent services from association members.
3. We strive to achieve the highest standards of ethics and integrity in our profession.
4. We maintain the highest level of communication and cooperation among all members.
5. We maintain and support the highest level of knowledge and competency in our profession.

Current Environment:

The <http://www.maricopa.gov/pubfid/afa.asp> website currently provides information with minimum interactivity. The AFA has recently purchased the domain names www.azfid.org and www.azfid.com. Our intent is to use www.azfid.org as the main address for the AFA and use www.azfid.com to redirect visitors to the main web site. We have not yet chosen hosting services for our web site and expect a proposed arrangement to be outlined in the proposal.

Issues with Current Site:

- The existing website is graciously hosted by the Maricopa Public Fiduciary Office. Unfortunately, this does not provide the Board of Directors with the ability to directly control the website.

- Website design does not reflect the professional image desired by the AFA.
- There are currently very limited resources available to the AFA membership on the website and therefore, the site does not offer additional value to the membership.

5. Purpose, Description and Objectives

Purpose

The AFA currently has a web presence that is somewhat outdated in appearance, structure, and in the presentation of content. We are hoping to re-engineer the website to better reflect the mission of the AFA, to increase both public and membership traffic, and to provide useful information and interactivity to our members. All content, coding, and graphics will become the sole property of the AFA.

Description

Create a flexible, informative, and interactive website that is easy to maintain. We must develop a friendly, useful site that can deliver constantly changing information to our key audience. We seek improved accessibility and editing functions which will allow authorized personnel to easily update content without directly accessing source code.

The AFA will retain ultimate editorial control of content.

To be effective, our web site must be:

- Easy & Intuitive
- Visually Pleasing
- Informative
- Safe & Secure
- Quick to load and operate
- Flexible enough to allow adaptation over the near term

Objectives

Our primary Internet objectives are to continue to build brand identity, awareness, and interest in the organization and the services it provides, to the

public and to our members. We also hope to provide content and interaction for our members.

Our Vision

- Draw professional members and the public to the site.
- Provide current, up-to-date information to members and public.
- Move membership towards web-based initiatives, i.e. event registration and surveys.
- Improve the functionality and interactivity of the website for both the profession and the public.
- Establish an online method of surveying, preparing and displaying reports, and data collection.

Specific Strategies

- Present comprehensive information and resources in an easy-to-use format; provide articles, information and links to information sites to answer questions about fiduciaries and the services they provide.
- Improve extranet capabilities to expand members-only levels for the AFA professional membership.
- Improve our online article database and search capacity/capability for our publications.
- Improve tools to assist prospective clients in locating certified fiduciaries.
- Increase site promotion activities.
- Integrate brand messaging.
- Deliver a consistent message
- Provide useful content for public and member visitors.

Make It Easy

Redesign the site to deliver intuitive navigation, an improved graphical user interface, and easy-to-find content organization.

Make It Compelling

Develop tools to deliver timely, relevant answers to the breadth and depth of member and visitor questions.

6. Timeline

- This RFP is dated September 1, 2005. Interested parties may also request a copy be sent via email by contacting Lisa Price at lisa@entrustfiduciary.com.
- Proposals are due no later than 12:00pm MST, Monday, October 4, 2005. We will attempt to answer questions until the proposal deadline. Please email lisa@entrustfiduciary.com or call (928) 782-0974.
- Proposals will be evaluated immediately thereafter. During this time we may require personal interviews with our evaluation team. You will be notified if this is required.
- A final decision is expected no later than the last week of October 2005 and is contingent upon approval by the AFA Board of Directors. Negotiations will begin immediately with the successful candidate. All other candidates will be notified shortly thereafter.
- We anticipate that the website should be published by the end of January 2006.

7. Budget

Please provide one or several cost proposals to accomplish the scope outlined below. Your cost proposal must encompass all design, production, and software acquisitions (if any) necessary for development and maintenance of the web site.

List budget breakdown for:

Phase I – Discovery, Requirements Planning & Site Definition

Phase II – Site Development, Testing & Deployment

The AFA has not allocated a specific figure for this project (Phase I & II).

8. Audience

- Members – active members, potential members, associate members
- Board members and staff
- AFA support and maintenance staff

- Visitors – current clients, potential clients and general interested parties

9. Scope and Guidelines

The scope of this project is to replace the existing AFA web site. The AFA will create/provide all of the site copy and provide the successful candidate with the necessary original and stock photography. A firm that can handle all site planning, interface design and production is required. The site must include a technology solution that allows the in-house staff to easily and cost-effectively update content and modify site design after the initial launch.

Discovery:

Confirm audience, objectives, graphic look and feel, navigation, site marketing, technology issues and assumptions, required functionality, and budgetary constraints, resulting in a creative proposal.(Is this the word you intended here?).

Design:

Web site information architecture, graphic look and feel, user navigation, home page and main navigation templates for each of the main navigation links and any other design required to fulfill the contract/proposal.

Design Development:

The website designed by the successful candidate must meet the following criteria:

- Create a content management system that will permit non-technical AFA staff to update web site content on most pages.
- Visually appealing – the site must have an attractive mix of text and graphics.
- Common Theme – each section of the site should have a common look and feel. The AFA logo should be prominently displayed on every page as a part of the header.
- Consistent Design – as stated above, each section of the site should have a common look and feel. The use of photographs, fonts, and layouts should be consistent throughout the site.
- Easy to Navigate – The site should be easy to navigate. Information should be grouped and presented in a logical manner and require no more than three levels of drill down for the user to find the desired information. The design

should never assume that the visitor has previous knowledge or experience with certified fiduciaries or the AFA website.

- The web site must support current levels of Internet Explorer, Netscape, Firefox, and MAC OS browsers and should function with minimum impact to users of other current browsers.
- Provide search capabilities using key words or phrasing that will identify content from throughout the site.
- Certified Fiduciary Search:
 - Member Search Criteria:
 - Data to be uploaded from selected columns/cells from our own database in Microsoft Access.
 - A specified number of referral names to be displayed from any one request – these should be randomly generated from an AFA membership database to be maintained by the AFA as part of the site.
 - Search Criteria:
 - Name, First & Last (wildcard should be assumed), fragmentary name
 - Zip Code
 - City of Practice
 - [Optional] interactive map of Arizona where visitors to site can click on their area to search only within that specified area. A good template for an Arizona map can be found at <http://www.infoplease.com/atlas/state/arizona.html>. Our members are already organized by area.
 - Search Results:
 - Full contact information selectable from up-loadable database (address/email/phone/etc.)
 - A configurable maximum number of results with appropriate message display stating that more results are available but not shown.
 - Appropriate message displayed if there are not any CFs available in a specific area, possibly including nearest available CFs.
 - Sorted by Last Name or in random order
 - Firm info/Website URLs/web links are to be shown on specified records
 - Appropriate messaging to indicate if user has filled out data fields incorrectly
- Secure Member Levels – the site should be composed of three separate member levels, each of which builds on the content on the home page. The presentation on both the public and private sides of the site should be similar

with the possibility of some identifying feature signifying viewing of limited access features.

- Public Page
 - Members Level
 - Board Level
- Allow for the creation and completion of member surveys. The surveys will be completed through a secure member login level. The results of the survey will only be available to members of the Board of Directors through an additional secure login level.

The look of the site should be clean, modern, and user-friendly. Once the website has been completed and accepted by the AFA, the web site design and all of its contents, software and architecture become property of the AFA.

These guidelines should be roughly adhered to, but the AFA is prepared to consider other concepts suggested as part of the proposal, and to eliminate elements that can be shown to be impractical or unnecessarily expensive or difficult to implement.

10. Available Technology Resources/Integration Issues

- We will use much of the existing web content. New content may include articles solicited from or prepared by members, interviews and user focus groups.
- We currently use Microsoft Publisher. There is a preference to continue using Publisher, however, other tools/functions/programs will be considered.
- Our membership database needs to be able to upload to the website on a daily basis. Real time updates are not necessary.
 - Membership databases currently exist in Microsoft Access format
 - Currently on the hard drive of an AFA staff member
 - The database needs to be updated both in office by the staff and by website functionality (not necessarily in real time).
- The AFA is currently working on a data collection initiative. We anticipate offering surveys to the membership through the web site. Therefore, the site must connect to a Microsoft Access database, into which the survey results will feed, to allow for maximum access and usability by the Board members.
- We do not have existing e-Commerce systems, web forums or other tools that the new site should be connected to; if possible we would like to be able to implement e-Commerce systems in the future, though it is not required at present.

11. Qualifications

1. List between three and five web sites your firm has produced that best reflect your work and relevancy to this project.
2. Describe your experience in producing sites for non-profit/community focused projects.
3. Provide current reference information for three former or current clients.
4. Briefly describe your firm's organizational capacity to produce our website (e.g. staff, equipment, software, physical space, office location, etc).
5. How many full time staff does your firm employ? Please include a copy of your firm's organizational chart.
6. Provide a company profile, length of time in business and core competencies.
7. Briefly describe the percentage of your web staff that would end up working on this project relative to your entire staff (using full time equivalents). For example, if you would use five staff on the project and you have ten web designers and developers, the percentage would be 50%.
8. What type of team will be assigned to this project? What will each person's role be? Please include a brief background summary for each key staff member assigned to this project.
9. Briefly describe your firm's project management process.
10. Percent of total revenue derived from site developments and other business ventures.
11. Explain your business model.
12. Please discuss any planned IPOs, mergers or acquisitions.
13. Please discuss any hardware/software vendor partnerships.
14. Please discuss your testing and support plan.
15. Please explain your service level agreement (SLA) structure.

16. Time frame for completion. The time frame for completion of the project will be evaluated. In addition, time frames will be part of the contractual agreement; therefore, a realistic time frame for completion is requested.

17. Terms and conditions.

Please note, the AFA is open to sole proprietors completing the outlined requirements for this project. Should some of the above information (i.e., staffing levels, organizational chart, etc.) not apply to your business structure, please outline this information fully in your proposal.

12. Evaluation Criteria

Proposals will be evaluated using the following criteria:

1. Suitability of proposal – the proposed solution meets the needs and criteria set forth in the RFP
2. Expertise in recommending and communicating appropriate technical and aesthetic solutions as evidence by the proposal and references, including project timelines, milestones and products
3. Aesthetic Capabilities – prior work demonstrates artistic and innovative, user-friendly interfaces that engage communities and viewers
4. Candidate Experience – candidate has successfully completed similar projects and has the qualifications necessary to undertake this project, including capability, personnel, and resources
5. Proposal Presentation – the information is presented in a clear, logical manner and is well organized
6. Proposal budget & cost

13. Format For Proposals

Please use the following as a guideline to format your proposal:

Length & Font Size:

Please use fonts no smaller than 12 point.

Title Page:

The Arizona Fiduciaries Association, Inc., Website Development Proposal, your company name, address, website address, telephone number, fax number, e-mail address and primary contact person.

Cover Letter:

Signed by the person or persons authorized to sign on behalf of the company and indicating their position.

Proposal:

Discuss your proposed solution, including the features, benefits, and uniqueness of your solution. You should also touch on your ability to deliver the project in the time frame noted.

Qualifications:

Provide the information requested in Section 12.

Budget & Fees:

List budgets as requested above. Identify staff you anticipate working on the project and their hourly rates for work that may be needed for Phase I & II.

Delivery Criteria:

Deliver proposals to the attention of:

Mailing Address:

Arizona Fiduciaries Association
c/o Lisa M. Price
P.O. Box 249
Yuma, Arizona 85366-0249

Delivery Address:

Arizona Fiduciaries Association
c/o Lisa M. Price
2115 South Arizona Avenue, Suite 6
Yuma, Arizona 85364

Email Address:

lisa@entrustfiduciary.com

If submitting the proposal via email delivery, please format the proposal in .pdf format using Adobe Acrobat.

If submitting the proposal via mail or personal delivery, please include a complete copy of the proposal on disk in .pdf format using Adobe Acrobat.

Screenshot of the existing AFA web site:

